# Oracle Fusion Cloud DataFox Data Management

## Using DataFox for Procurement

September 2023

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# Contents

# Get Help

Here's an introduction to some information sources that can help you use the application and this guide.

## Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Here are some more links to help you get started quickly:

- *Contact My Oracle Support*
- *Create your Oracle account*
- *Work effectively with Support*
- *Create a technical service request*

## Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community.

You can use these forums to connect with other customers, post questions, and watch events:

- *Supplier Management*
- *DataFox for Sales*

## Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*.

## Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_aiapps_doc_feedback_grp@oracle.com*.

Thanks for helping us improve our user assistance!

# 1 Overview of Oracle DataFox

## Welcome to DataFox

Oracle DataFox aggregates company intelligence from multiple sources into one powerful platform. You can use DataFox signals and insights to enrich supplier data, and streamline supplier onboarding. Additionally, you can set up alerts to monitor and manage risks in an effective manner.

Administrators integrate Oracle DataFox with Oracle Fusion Cloud Procurement to set up Supplier Intelligence, match suppliers with companies, and set up scoring criteria. To get started, see *Oracle DataFox Setup Tasks*.

Administrators and members can set up alerts. See *Supplier Signals*.

Here are some benefits of implementing DataFox Supplier Intelligence:

- Analyze and evaluate supplier risk using scores. You can use DataFox scores to identify suppliers with potential risks before you approve registration requests. If it's an existing supplier, you can take corrective actions.
- Monitor and mitigate risks using signals and alerts. Set up signals to receive alerts about suppliers when there are events that may indicate risk.
- Use smart supplier onboarding to create DataFox-validated suppliers. Select a supplier from the DataFox suggestions list to automatically enrich the supplier profile with DataFox firmographic and intelligence data.
- Enhance supplier creation and registration processes to prevent creating duplicate suppliers.

For more details on how you can use DataFox Supplier Intelligence, see:

- *DataFox Supplier Intelligence*
- *Create a Supplier and Supplier Site*
- *Supplier Registration Process*
- *Supplier Registration Approval Attributes*

For information on browser support, see *System Requirements*.

## Accessibility

You can use assistive technology products, such as screen readers, while you work in Oracle DataFox. You can also use the keyboard instead of the mouse.

This table lists the supported accessibility features.

| Feature | Description |
|---|---|
| Zoom | You can use your browser's zoom feature to resize text up to one fifty percent without loss of content or functionality. |
| Contrast | Large-scale text, and images of large-scale text have a contrast ratio of at least 3:1. |

| Feature | Description |
|---|---|
| Screen Reader | You can use screen readers. No special mode is required to enable it. |

# User Roles and Privileges

This table describes the roles in Oracle DataFox and the privileges associated with each role.

| Role | Privileges |
|---|---|
| Member | • View and search company profiles<br>• View and search signals<br>• View scores of the criteria set assigned to the member<br>• Create, upload, and share lists<br>• Set up signal alert preferences on lists<br>• View roles assigned to the team<br>• View scoring criteria sets<br>• View users in the account |
| Admin | An admin has all the privileges of a member.<br>• Create and edit scoring criteria sets<br>• Assign scoring criteria sets to users<br>• Set a default criteria set<br>• Build different list reports with different scoring criteria sets as the filter |
| Account Owner or Service Admin<br>**Note:** To change your account owner, you need to raise a service request in *My Oracle Support*. | The account owner has all the privileges of an admin and a member.<br>• Transfer a deleted user's owned lists |

This table describes the roles in Oracle Identity Cloud Service that DataFox users need along with their privileges.

| Role | Privileges |
|---|---|
| User Administrator | • Add and remove users<br>• Assign and change user roles<br>• Assign users to the DataFox admin or member groups<br>• Update users' details |

| Role | Privileges |
| --- | --- |
| | • Enable password reset for users<br>• Add applications and APIs that integrate with DataFox, in IDCS |
| Identity Domain Administrator | Identity domain administrator has all the privileges of a user administrator.<br>• Assign users to the DataFox admin group, member group, and the IDCS_Administrator group<br>• Perform single sign-on related tasks in Oracle Identity Cloud Service<br>You can also assign users to the IDCS_Administrator group to provide them the same set of privileges as an identity domain administrator. |
| Security Administrator | • Add and remove users<br>• Assign and change user roles<br>• Assign users to groups<br>• Update users' details<br>• Enable password reset for users<br>• Perform single sign-on related tasks in Oracle Identity Cloud Service |

For details on adding users and assigning roles, see *Manage Users Using Oracle Identity Cloud Service*.

# 2 Get Started for Admins

## Oracle DataFox Setup Tasks

If you're an admin, here's how you can get started with Oracle DataFox and set it up for your users.

- *Get Started with Oracle DataFox in Oracle Cloud*
- *Manage Users Using Oracle Identity Cloud Service*
- *Single Sign-On in Oracle Identity Cloud Service*
- *Integrate with Oracle Fusion Cloud Procurement*

## Get Started with Oracle DataFox in Oracle Cloud

To start using Oracle DataFox, activate the service in an existing account or start by creating an Oracle Cloud account.

If you already have an Oracle Cloud account hosted on a phoenix data center, you can use the same account for Oracle DataFox instead of creating an additional one. To check the data center of your account:

1. In your Oracle Cloud account, click your user name and click **About**.
2. In the **Region** field, check the value.

   If you see a value with phoenix, for example, **us-phoenix-1**, your cloud account is hosted on a phoenix data center.

### Activate Your Oracle DataFox Order in a New Oracle Cloud Account

After you buy the subscription for Oracle DataFox, you receive an email from Oracle with the subject **Welcome to Oracle Cloud. Set up your account**.

1. Click **Create New Cloud Account** in the email.
2. On the Activate My Services page, in the **Cloud Account Name** field, enter a unique name for your account like your organization's name.

   > **Note:** It's good practice to use your organization's name for your account. Do not use your name, any Personally Identifiable information (PII), name of the product (DataFox), or name of the environment (production, sandbox) in your cloud account name.

3. Enter your email address. The email address must be the same as the person who received the welcome email.
4. Enter the administrator details.
5. Click **Create Account**.

You should see a confirmation message that your Oracle Cloud service is activated.

Although your account is typically created within an hour, it may sometimes take up to a day. After your account is created, you will receive an email with the subject **Setup Complete. You're ready to go**. Now, you can sign in to Oracle Cloud and access your Oracle DataFox instance.

## Activate Your Oracle DataFox Order in an Existing Oracle Cloud Account

If you're using your existing Cloud account, you'll still receive the email with the subject **Welcome to Oracle Cloud. Set up your account** after you subscribe. You must activate your Oracle DataFox service to get started.

1. Click **Activate into Existing Cloud Account** in the email.
2. On the Oracle Cloud sign-in page, enter your existing Oracle Cloud account name.
3. On the Oracle Cloud Infrastructure Classic Dashboard page, go to the navigation menu, and click **Account**.
4. From the Activate tab, find the Oracle DataFox service that you want to activate and click **Cloud Services Account Setup**.
5. On the Activate My Services page, from the **Cloud Account Name** list, select the account for which you want to activate the Oracle DataFox service.
6. Click **Assign Account**.

You'll see a message confirming that your Oracle Cloud service is activated. After your account is activated, you'll receive an email with the subject **Setup Complete. You're ready to go**. Now, you can sign in to Oracle Cloud and access your Oracle DataFox instance.

## Sign In to Oracle Cloud for the First Time

Keep the setup complete email that you received handy. This email includes the link to your service, user name, and a temporary password.

1. In the Access Details section of the email, click **Console URL**.
2. Use the user name and the temporary password shared in the email to sign in to Oracle Cloud.
3. In the Reset your password dialog box, change your password.

You will receive an email confirming that your password is updated. After you reset the password, you will see the Oracle Cloud Infrastructure Classic Dashboard.

## Access Your Oracle DataFox Instance

Access your Oracle DataFox instance from the Oracle Cloud dashboard or using the service instance URL that you received in the setup complete email. Follow these steps to add Oracle DataFox to your dashboard.

1. On the Oracle Cloud dashboard, click the icon next to **Dashboard**.
2. In the Customize Dashboard dialog box, find DataFox, and click **Show** to add DataFox to the dashboard in the Active Applications section.
3. In the Active Applications section, click **DataFox**.
4. On the Service: Oracle DataFox Cloud Service page, click **Open Service Console**.
   Alternatively, on the Oracle Cloud dashboard navigator, click **DataFox** to access your Oracle DataFox instance.

Your unique Oracle DataFox service instance opens. You can now start using the application.

To add users, go to **Settings** > **Team Management** and click **Oracle Identity Cloud Service**. For details, see *Manage Users Using Oracle Identity Cloud Service*.

# Get an Additional Oracle DataFox Instance

If you want to test features in a stage environment before they are released, you need an additional Oracle DataFox instance. Start by creating an additional Oracle Identity Cloud Service instance, and then request an additional DataFox

instance using a service request. This additional instance is associated with the new Oracle Identity Cloud Service instance. Here's how you can create an additional Oracle Identity Cloud Service instance:

1. Sign in to the Oracle Cloud dashboard.
2. From the Active Services section, click **Identity Cloud**.
3. On the Oracle Identity Cloud Service page, in the Service Instances section, click **Create Service Instance**.
4. On the Create New Oracle Identity Cloud Service Instance page, enter these details:

| Field | Value |
|---|---|
| Name | Instance name<br>**Note:** The name that you enter here will be suffixed to the new IDCS instance. It's good practice to include stage or prod in the name to indicate why you're creating the additional instance. |
| License Type | IDCS Foundation |
| Email | Email of the admin<br>**Note:** If you want another user to be the admin for this new instance, you can enter that user's email address. |
| First Name | First name of the admin |
| Last Name | Last name of the admin |

5. Click **Create**.

   You will receive an email with the details of the service instance along with a user name and a temporary password. The email is sent to the address that you entered in the **Email** field.
6. In the Access Details section of the email, click the Admin Console URL link.
7. Sign in to the Oracle Identity Cloud Service instance using the user name and password in the email.
8. In the Reset Your Password dialog box, change your password.

After an Oracle Identity Cloud Service instance is created, create a technical service request in My Oracle Support for an additional Oracle DataFox instance. While creating the service request, select these values:

- Product: 2541 - Oracle Fusion Supplier Model
- Component: Manage Supplier
- Subcomponent: Supplier Profile Admin

In the service request, provide the Admin Console URL, the email address, and the first and last names of the admin for the new Oracle Identity Cloud Service instance.

After the request is processed, Oracle Support updates your service request with the details of the new Oracle DataFox instance. You can then sign in using your new Oracle Identity Cloud Service instance credentials. You can also create new admins and users for the newly created Oracle DataFox instance.

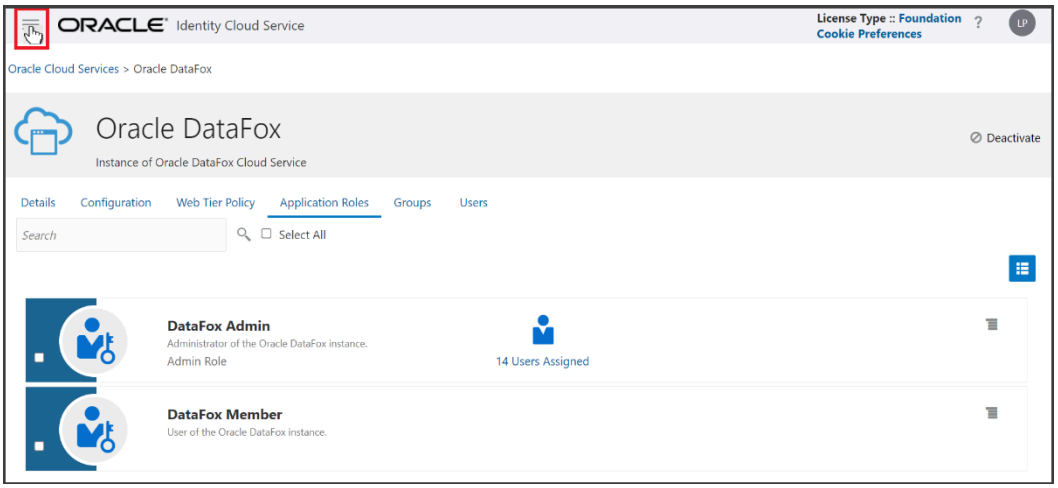
# 3 Manage Users, Single Sign-On, and DataFox Settings

## Manage Users Using Oracle Identity Cloud Service

As a DataFox account owner and an IDCS administrator, you can manage users in Oracle Identity Cloud Service. You can also assign the IDCS administrator role to a DataFox admin so that they can manage users.

1. From the user menu in Oracle DataFox, click **Settings**, and then click the Team Management tab.
2. On the Team Management page, click **Oracle Identity Cloud Service**.

   You'll see the Oracle DataFox page in Oracle Identity Cloud Service.
3. Go to the navigation menu and click **Users**.




4. Create your users. See *Create User Accounts*.
5. Go to the navigation menu and click **Oracle Cloud Services**.
6. On the Oracle Cloud Services page, click **Oracle DataFox**.
7. Click the Application Roles tab and assign either the DataFox Admin or the DataFox Member role to your users.

   After you add your users, they will receive an email to activate their user account.
8. Assign the required Oracle Identity Cloud Service roles to your users. See *Add or remove a user account from an Administrator role*.

   To understand the different administrator roles in Oracle Identity Cloud Service, see *Understand Administrator Roles*.
9. Optionally, assign your admin users to the IDCS_Administrators group so that they can manage users in Oracle Identity Cloud Service. See *Assign Groups to the User Account*.
10. Share the DataFox instance URL with the users that you add.

    Your users can access the application with the URL that you share with them. See *About Signing In and Changing Your Credentials*.

## Resend DataFox Account Activation Link to Your Users

After you add your users in Oracle Identity Cloud Service, they will receive an email to activate their user account. If they don't activate their account within 7 days of receiving the email, the activation link in the email expires. If it does, you need to send a password reset link to your users. For details, see *Reset Passwords for User Accounts*.

# Single Sign-On in Oracle Identity Cloud Service

If you manage users using Oracle Identity Cloud Service and want to use single sign-on, contact Oracle Support to configure your identity provider.

For a list of supported single sign-on providers, see *Manage Oracle Identity Cloud Service Identity Providers*.

# DataFox Settings

To access settings, click the user menu, and then click **Settings**. Here's what you can do on the Settings page.

| Setting | Description |
|---|---|
| General Information | Change your user information and password.<br><br>Click **Change User Info** to open Oracle Identity Cloud Service, where you can change your profile information and password. |
| Integrations | Manage your Oracle DataFox integrations across various applications. |
| Team Management | Add and delete users and control their access to Oracle DataFox. Click **Oracle Identity Cloud Service** to manage users.<br><br>See: *Manage Users Using Oracle Identity Cloud Service*. |
| Silenced Alerts | Silence emails and Slack alerts from individual companies to stop tracking and receiving updates from them. You can always choose to unsilence a silenced company. |
| Scoring | Select a default scoring criteria set for your users if you've created multiple criteria sets. |

# About Signing In and Changing Your Credentials

When your administrator creates your user account, you will receive an email asking you to activate your user account. Click **Activate Your Account** in the email to open Oracle Identity Cloud Service and set your password. Your administrator will share the DataFox instance URL with you. Use that URL to access the application.

If you don't activate your user account within 7 days of receiving the email, the activation link expires. If it does, ask your IDCS service admin or IDCS administrator to send a password reset link to you.

You can change your user information and password on the General Information page using **Change User Info**. Clicking this button opens Oracle Identity Cloud Service, where you can change your profile information and password. To go to the General Information page, click your user name, click **Settings**, and then click the General Information tab.

# 4 Integrate with Oracle Fusion Cloud Procurement

## Overview of Supplier Enrichment with DataFox

You can enrich your supplier information with Oracle DataFox data and ensure that your supplier records are up to date. Use the intelligent data, signals, and alerts to monitor and manage supplier risks effectively.

As an admin, here's a list of tasks for you to set up DataFox Supplier Intelligence.

- *Setup Steps in Oracle Fusion Cloud Procurement*
- *Setup Steps in Oracle DataFox*

## Before You Start

Before you set up Oracle DataFox integration with Oracle Fusion Cloud Procurement, you need to have these:

- A valid license for Oracle DataFox Supplier Intelligence Cloud Service.
- Oracle DataFox activated in your Oracle Cloud account. See *Get Started with Oracle DataFox in Oracle Cloud*.
- It's best practice to create a dedicated user in Procurement for DataFox. Assign the supplier manager and supplier intelligence roles to this user. You will need these credentials to connect to Procurement. See *Connect to Oracle Fusion Cloud Procurement*.
- The client ID and secret values. You can generate these as a DataFox admin. For details, see the Generate Client ID and Secret Values and Generate the API URL Value sections here. Keep the client ID, secret, and the API URL values handy. You will need these details to complete authentication when you're configuring DataFox Supplier Intelligence.

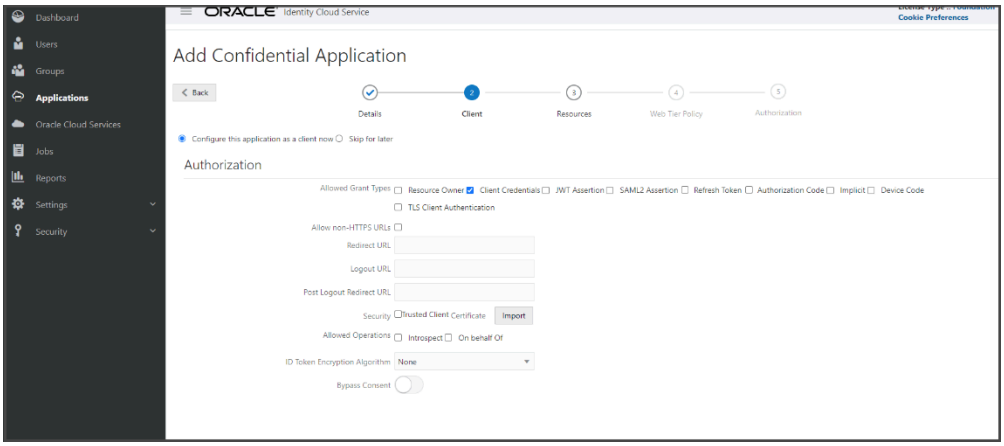
### Generate Client ID and Secret Values

You must create a confidential application in Oracle Identity Cloud Service for the client ID and secret values. Procurement uses this confidential application to authenticate with DataFox APIs when you enrich accounts, use account smart data, and view DataFox news signals. Here's how you can add a confidential application:

1. From the user menu in Oracle DataFox, click **Settings**, and then click the Team Management tab.
2. On the Team Management page, click **Oracle Identity Cloud Service**.
3. In Oracle Identity Cloud Service, on the Oracle DataFox page, click the navigation menu and click **Applications**.
4. On the Applications page, click **Add**.
5. On the Add Application page, click **Confidential Application**.
6. On the Add Confidential Application page, Details stop, App Details section, enter a name for your new application, for example, DataFox API Client.
7. In the Details stop, leave the other fields as is, and click **Next**.
8. In the Client stop, do the following:
    a. Select **Configure this application as a client now**.

b. In the Authorization section, in the **Allowed Grant Types** field, select **Client Credentials** as shown in this image.

> **Note:** Make sure that you select the correct check box.




c. In the Token Issuance Policy section, click **Add Scope**.

d. In the Select Scope dialog box, locate Oracle DataFox, and click the **Select scopes for this resource** icon.

> **Note:** In the Select Scope dialog box, make sure that you select scopes for Oracle DataFox and not for any other application. Otherwise, you won't be able to sync data from DataFox to Procurement.

e. Select the scopes that end with these values:
   - /full
   - /companies
   - /matching

   Here's an example of the full scope value: **https://example-customer.api.datafox.ocs.oraclecloud.com/full**.

f. Click **Add**.

   The selected scope appears in the Resources section of Token Issuance Policy.

g. Click **Next**.

9. In the Resources stop, click **Next**.
10. In the Web Tier Policy stop, click **Next**.
11. In the Authorization stop, click **Finish**.

    The application is added in a deactivated state.
12. Note down the client ID and secret that are displayed in the Application Added dialog box.
13. Click **Close**.

    The details page of the new application appears.
14. Click **Activate**.
15. In the confirmation dialog box, click **OK** to activate your new application.

You can access the client ID and secret that you generated at any time. In the Oracle Identity Cloud Service navigation menu, click **Applications** and go to the application's page that you created. In the Configuration tab, you can see the client ID and secret.

## Generate the API URL Value

You can generate the API URL from your DataFox web app URL. In your DataFox web app URL, replace app with api. For example, if your DataFox web app URL is **https://idcs-c7e6c270dfb84190a242e138138157ad.app.datafox.ocs.oraclecloud.com**, then your API URL is **https://idcs-c7e6c270dfb84190a242e138138157ad.api.datafox.ocs.oraclecloud.com**.

# Setup Steps in Oracle Fusion Cloud Procurement

Sign in to Oracle Fusion Cloud Procurement as a procurement applications administrator and complete these steps:

- Opt in to the feature Manage Supplier Risk with DataFox Supplier Intelligence.
- Configure Supplier Integration with DataFox.
- Set the Suppress Success Log Generation After Job Complete Enabled (ZCA_IMPORT_SUPPRESS_SUCCESSLOG_GENERATION) profile option to **No**.

## Opt in to Manage Supplier Intelligence with DataFox Supplier Intelligence

To start setting up your integration, you need to opt in to DataFox features in Oracle Fusion Cloud Procurement.

1. Go to the **Setup and Maintenance** work area.
2. From the **Setup** list, select **Procurement**.
3. In the Functional Areas region, click **Change Feature Opt In**.
4. Click the **Edit Features** icon for Suppliers under Procurement.
5. Find Manage Supplier Risk with DataFox Supplier Intelligence and select the **Enable** check box.
6. Optionally, expand Manage Supplier Risk with DataFox Supplier Intelligence and select the **Enable** check box for Use DataFox Supplier Intelligence in Supplier Self-Service Registration.

   If you enable this feature, you can streamline external supplier registration using DataFox firmographic data.
7. Click **Done**.
8. On the Opt In: Procurement page, click **Done**.

   You've now opted in to the Manage Supplier Risk with DataFox Supplier Intelligence feature.

## Configure Supplier Integration with Oracle DataFox

After you opt in to the feature, you need to configure supplier integration with DataFox.

1. In the Setup and Maintenance work area, make these selections:
   - Offering: Procurement
   - Functional Area: Suppliers
   - Task: Configure Supplier Integration with DataFox

   If you don't see the task, make sure to select **All Tasks** in the **Show** field.

Alternatively, you can search for the task using the **Search Tasks** field in the Setup and Maintenance work area.

2. On the Configure Supplier Integration with DataFox page, enter the client ID and secret that you generated in a previous step. Now, enter the API URL as indicated in the table. See *Before You Start*.

| Field | Corresponding Value |
|---|---|
| URL | API URL |
| User Name | Client ID |
| Password | Secret |

3. Click **Save and Close**.

## Set Profile Option

Make sure to set the profile option **Suppress Success Log Generation After Job Complete Enabled** (ZCA_IMPORT_SUPPRESS_SUCCESSLOG_GENERATION) to No. This ensures that the supplier data quality and firmographics enrichment work as expected, and that DataFox can generate diagnostic reports.

1. In the Setup and Maintenance work area, click **Search** in the links panel.
2. On the Search page, search for and click **Manage Administrator Profile Values**.
3. On the Manage Administrator Profile Values page, in the Search: Profile Option region, **Profile Option Code** field, enter **ZCA_IMPORT_SUPPRESS_SUCCESSLOG_GENERATION**.
4. Click **Search**.
5. In the ZCA_IMPORT_SUPPRESS_SUCCESSLOG_GENERATION: Profile Values region, make sure to set the Site Profile Value option to **No**.
6. Click **Save and Close** if you made any changes.

# Setup Steps in Oracle DataFox

To complete setting up the integration, perform the following steps as an admin in Oracle DataFox:

1. *Connect to Oracle Fusion Cloud Procurement*.
2. *Bulk match supplier profiles*.
3. *Set up field mappings*.
4. *Set up bulk sync*.
5. *Set up scoring*.
6. *Set Up Alerts for Supplier Signals*.

## Connect to Oracle Fusion Cloud Procurement

1. Sign in to Oracle DataFox.
2. Click your user name, and then click **Settings**.
3. Click **Oracle Procurement Cloud** under Integrations.

4. Enter the Procurement instance URL, user name, and password.

   While entering the user name, keep these things in mind:
   - The Procurement user whose credentials you're entering here must have the supplier manager and supplier intelligence roles assigned.
   - Make sure that you use a user account that's created directly within the Procurement application, and not use single sign-on. You can't connect DataFox to Procurement using your single sign-on credentials.

5. Click **Next**.

   You can now create a matching project to bulk match supplier profiles. For details, see *Create a Matching Project*.

> **Note:** If you need to disconnect the connected Procurement instance, raise a service request. While creating the service request, select these values:
> - Product: 2541 - Oracle Fusion Supplier Model
> - Component: Manage Supplier
> - Subcomponent: Supplier Profile Admin

# Bulk Match Supplier Profiles

Bulk match supplier profiles with DataFox companies to update them with firmographics and intelligence data in bulk. To do that, create a matching project from the DataFox app. For details, see *Create a Matching Project*.

After you create a matching project and DataFox finds companies that match your supplier profiles, link the matched companies to the profiles. You can also make changes to the matches that DataFox finds and link supplier profiles with the companies you want. Linking a supplier profile with a company enables DataFox to enrich the linked supplier profiles with firmographics and intelligence data.

For details on how the matching process works, see *Overview of Data Diagnostics and Enrichment*.

# Set Up Field Mappings

Here's how you can set up field mappings to enrich your supplier profiles with DataFox firmographics and intelligence data.

1. Sign in to Oracle DataFox.
2. Click your user name, and then click **Settings**.
3. Under Integrations, click **Oracle Procurement Cloud**.
4. On the DataFox for Oracle Procurement Cloud page, click the Field Mappings tab.

5. Map the DataFox fields to the corresponding Oracle Fusion Cloud Procurement fields.

   While you're mapping fields, keep these points in mind:

   - You can map DataFox fields to existing or to new Procurement fields added with the Manage Supplier Risk with DataFox Intelligence feature. In the Procurement application, you can see these new fields in the Additional DataFox Attributes section on the Supplier Profile page.

     > **Note:** The Additional DataFox Attributes section is hidden by default. Use Page Composer to make the section visible.

   - When you create a supplier in Procurement and enrich it with DataFox data, the additional DataFox data is displayed in the Additional DataFox Attributes section on the Supplier Profile page and not on the Registration page.
   - If you want DataFox to overwrite existing field data, in the **Overwrite Existing Data** column, select **Yes**. If you want to retain the existing values, select **No**. If you select **No**, DataFox only updates the fields that don't have a value.

6. Click **Save**.

> **Note:** If you change any field mappings after you set them up, you need to raise a service request to enrich supplier profiles with the updated field mappings. While creating the service request, select these values:
>
> - Product: 2541 - Oracle Fusion Supplier Model
> - Component: Manage Supplier
> - Subcomponent: Supplier Profile Admin

## Field Mappings

Here's the full list of standard Oracle DataFox fields available for enrichment.

| Oracle DataFox Field | Field Type | Maximum Width | Oracle Fusion Cloud Procurement Field | Description and Example Output |
|---|---|---|---|---|
| DataFox ID | String | 80 | DataFox ID | The DataFox ID whose data enriches into this supplier.<br><br>Example Output: 5130efc98989846a3600107a |
| Name | String | NA | Supplier, Alternate Name, Alias, Company Name | The DataFox name for this company.<br><br>Example Output: Oracle |
| Legal Name | String | 300 | Supplier, Alternate Name, Alias, Legal Name | The legal name of the company. DataFox doesn't always have data for this attribute.<br><br>Example Output: Oracle |
| URL | Long Text | 2000 | Corporate Web Site, Company Primary URL | The company's website. |

| Oracle DataFox Field | Field Type | Maximum Width | Oracle Fusion Cloud Procurement Field | Description and Example Output |
|---|---|---|---|---|
| | | | | Example Output: oracle.com |
| EIN | String | 20 | EIN, Taxpayer ID | The unique identifier for IRS (US only).<br><br>Example Output: 42723701 |
| Country | String | 2 | Tax Country, Country | The country where the company operates.<br><br>Example Output: US |
| Revenue Estimate | Number | NA | Current Fiscal Year's Potential Revenue | An estimate of the company's annual revenue.<br><br>Example Output: 2837845000 |
| Year Founded | Integer | NA | Year Established | The year of establishment of the company.<br><br>Example Output: 1981 |
| NAICS Code | String | 300 | NAICS Code, SIC | The NAICS (North American Industry Classification System) code.<br><br>Example Output: 722511 |
| Industry Category Code | String | 300 | Industry Category Code | The industry code that represents the category.<br><br>Example Output: ORA_DF_INDUSTRY_028 |
| Industry Subcategory Code | String | 300 | Industry Subcategory Code | The subindustry category of the company.<br><br>Example Output: ORA_DF_INDUSTRY_211 |
| Score | Number | NA | Supplier Score, DataFox Intelligence Score | The numeric value that indicates the score for a supplier profile.<br><br>To view this field in the Procurement application, your users need to have the Supplier Intelligence role assigned.<br><br>Example Output: 250 |

| Oracle DataFox Field | Field Type | Maximum Width | Oracle Fusion Cloud Procurement Field | Description and Example Output |
|---|---|---|---|---|
| Last Synced Date | Score | NA | Last Synced Date | The most recent date when this supplier profile was last enriched.<br><br>Example Output: 2019-08-20T18:04:02.461Z |

# Bulk Sync Supplier Profiles

You can use Oracle DataFox bulk sync to update supplier profiles with the latest firmographics and intelligence data.

To set bulk sync frequency and view the history of the enriched supplier profiles, navigate to **Settings** > **Integrations** > **Oracle Procurement Cloud** > **Bulk Syncs**. It's good practice to set the sync frequency based on the number of supplier profiles.

Bulk syncs are incremental. Each sync includes only those synced profiles that are updated in DataFox since the last sync. For example, you set the bulk sync frequency to enrich up to 10,000 supplier profiles and 4000 profiles are updated in DataFox in a day. During bulk sync, DataFox enriches those 4000 supplier profiles with the latest data. If no profiles are updated in DataFox since the last sync, then bulk sync will not enrich any supplier profiles that day.

## Bulk Sync History

In the Bulk Sync History section, you can see the total number of enriched supplier profiles, who initiated the sync, and the sync status. You can also see when the sync was scheduled and completed, displayed in your local time. When the sync is complete, you see a link to a diagnostic report in the section. Click the link to download a CSV file with details of the bulk sync.

- A Success Report confirms the enrichment of all supplier profiles.
- An Exception Report provides troubleshooting information if some supplier profiles couldn't be enriched.

  The exception report may include supplier profiles with pending changes or spend authorization requests.

## Bulk Sync Errors

If supplier profiles aren't enriched during bulk sync, you can check the errors in the bulk sync exception report and resolve them. Here are some examples of sync errors, their details, and the steps you can take to resolve them.

| Error | Details | Resolution |
|---|---|---|
| An error occurred during the data import. Details: This error occurred while importing data: This supplier profile is locked for editing as a spend authorization request is pending approval. You can't make this change at this time. (POZ-2130453). | Supplier profiles with pending spend authorization requests are locked. These profiles are not enriched during bulk syncs until the requests are resolved. | You need to wait until the record is unlocked. After the request is approved and the record is unlocked, it's enriched in the next scheduled bulk sync. |

| Error | Details | Resolution |
| --- | --- | --- |
| An error occurred during the data import. Details: This error occurred while importing data: You must opt in to Manage Supplier Risk with DataFox Supplier Intelligence when you provide a value for DataFox ID. (POZ-2130543). | If you don't complete the setup steps in the Procurement application, and connect to DataFox to set up bulk syncs, this error occurs. | You need to complete the setup steps in the Procurement application, connect to DataFox, and set up bulk syncs. For details, see *Setup Steps in Oracle Fusion Cloud Procurement*. |

# 5 Matching and Linking

## Matching Projects in Oracle DataFox

After you set up DataFox Supplier Intelligence, link your supplier profiles with companies using a matching project. After supplier profiles are linked to companies, DataFox can enrich the linked supplier profiles with the latest firmographic data.

As a DataFox Administrator, you can create a matching project to find matches for supplier profiles. Here's how you can do that:

1. Create a matching project. DataFox runs a series of AI-based algorithms to match your suppliers with companies and generates a match report.
2. Review the report and make any necessary changes manually.
3. Publish the matches to Oracle Fusion Cloud Procurement. This step links your suppliers with the matched companies.

You can also manually link supplier profiles with the companies that you want. For details, see *Link Records*.

## Create a Matching Project

As an administrator, you can create matching projects on the Matching & Linking page in the DataFox app.

### Before You Start

Here's what you need to complete before you create a matching project:

- Connect DataFox to Oracle Fusion Cloud Procurement. See *Connect to Oracle Fusion Cloud Procurement*.
- Determine if you want to use a CSV file or Procurement as the source to create a matching project.
  - If Procurement is the source of your matching project, make sure that you complete your field mappings. For details, see *Set Up Field Mappings*.
  - If CSV file is the source of your matching project, prepare a file with these column names:

| Column Name | Required or Optional | Description |
|---|---|---|
| SupplierID | Required | The supplier number. If you don't have a value for this column, enter a sample ID. |
| Name | Required | Name of the supplier. |
| URL | Required | The corporate website or you can use the contact email domain if corporate website isn't available. If you don't have a value for this column, you can leave it empty. But make sure you create the column and name it URL. |

| Column Name | Required or Optional | Description |
|---|---|---|
| Country | Optional | The taxpayer country. This can be International Organization for Standardization (ISO) code or the country name. |
| Zip code | Optional | The postal code. |

It's recommended that you include the optional columns mentioned in the table for a better match rate.

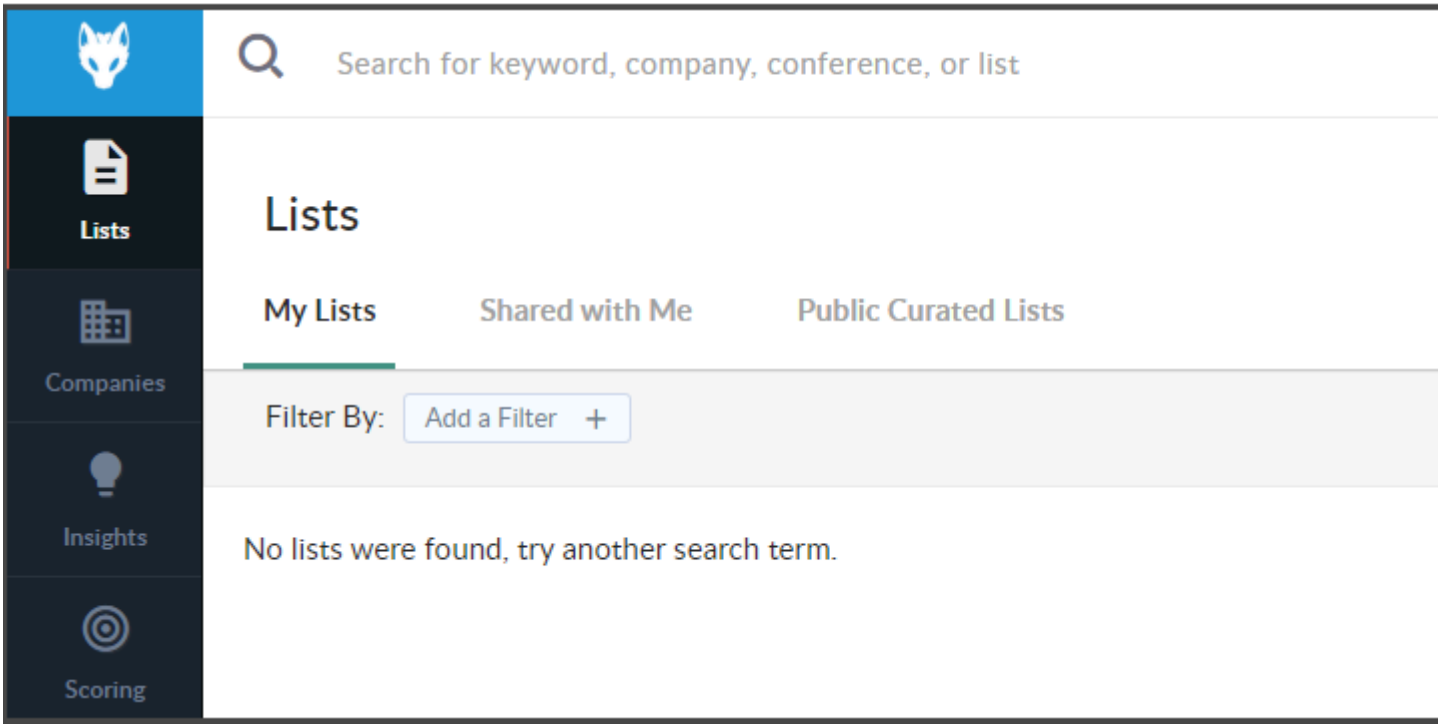
Here are some other recmmendations for a better match rate:

- Clean up supplier names in Procurement by removing invalid characters like numbers or dates.
- Enter the country and corporate website URLs if you have those details.

## Create a Project

Here's how you can create a matching project.

1. Sign in to DataFox.
2. Click your user name, and then click **Settings**.




3. Click **Matching & Linking**.
4. On the All Projects page, click **New Matching Project**.

5. Enter these details in the New Project dialog box:
    a. In the **Matching Project** field, enter a name for the project.
    b. In the **Source** field, select either **Import from Procurement Cloud** to use Procurement or **Upload from CSV** to use the CSV file you prepared as the source.
    c. If you select Upload from CSV, in the **New Project File** field, upload the CSV file you prepared.
    d. Optionally, select the **URL Required for Matching** check box. If you select this, DataFox finds a match only if the supplier has a corporate website in Procurement or if you've included the URL in the source CSV file. Don't select this check box unless you have the corporate website details.
6. Click **+ New Project**.

You can see a matching project created on the All Projects page with the status Matching in progress. Depending on the number of suppliers to match, the project can take up to a few hours to complete. Click the project you created to open the details page.

DataFox doesn't match inactive suppliers with companies. It also doesn't find matches for Individual and Foreign Individual type suppliers.

After DataFox completes matching companies with suppliers, the status updates to Matching Complete. You can then download the match report on the project details page. Next, review the match report and make any changes if required. For details, see *Review the Match Report*.

# Review the Match Report

After matching suppliers with companies, DataFox generates a report with the matching results. Here's how you can download and review the report:

1. In the DataFox app, click your user name, and then click **Settings**.
2. Click **Matching & Linking**.
3. On the All Projects page, click the project that you created.
4. On the project details page, click **Download Match Report** to download the file with the matching results.

   Here are the columns in a match report and their descriptions:

| Column in Excel | Name of the Column | Description |
|---|---|---|
| A | id | Supplier ID. |
| B | status | Status of the supplier matching. It can have these values:<br>o Verified<br>o Unmatched<br>o Duplicate |
| C | score | The DataFox confidence score. A score more than 0.5 is considered a match. |
| D | duplicate group | If DataFox matches a company with more than one supplier, then all these suppliers are categorized under one duplicate group. |

| Column in Excel | Name of the Column | Description |
|---|---|---|
| E | datafox_id | Unique ID of the DataFox company that matched with the supplier. |
| F | Datafox Name | DataFox company name. |
| G | Matched-on Name | The matched company's former name, alias, legal name, or acronym. It specifies why DataFox matched the supplier with a company that's different from the supplier name in Procurement or the input CSV file. |
| H | Datafox Street1 | Address of the DataFox company. |
| I | Datafox City | City in which the company is located. |
| J | Datafox State | State in which the company is located. |
| K | Datafox Zipcode | Zipcode in which the company is located. |
| L | Datafox Country Label | Country in which the company is located. |
| M | Datafox Country Code | Code of the country where the company is located. |
| N | DataFox URL | The company's URL in DataFox. |
| O | DataFox Profile URL | The URL of the profile that DataFox assigned to the company. |
| P | DataFox Description | The description of the company in DataFox. |
| Q | Exit Status | The exit status of the company as available in DataFox. |
| R | Number of Employees | The number of employees in the company as available in DataFox. |
| S | Revenue | The revenue of the company as available in DataFox. |
| T | Industry | The industry that the company belongs to. |
| U | Subindustry | The subindustry that the company belongs to. |
| V | Primary NAICS Code | The primary NAICS code of the company. |
| W | Parent ID | The parent company's ID. |
| X | Parent Name | The parent company's name. |
| Y | Global Parent ID | The ID of the global parent company. |
| Z | Global Parent Name | The name of the global parent company. |
| AA | Domestic Parent ID | The ID of the domestic parent company. |
| AB | Domestic Parent Name | The name of the domestic parent company. |

| Column in Excel | Name of the Column | Description |
|---|---|---|
| AC | Potential Match DataFox ID | The ID of the company that's a potential match for the supplier. |
| AD | Potential Match Name | The name of the company that's a potential match for the supplier. |
| AE | Potential Match URL | The URL of the company that's a potential match for the supplier. |
| AF | Potential DataFox Company Profile URL | The URL of the company's DataFox profile that's a potential match for the supplier. |
| AG | bucket | Detailed status of the matching. It can have these values:<br>o matched<br>o not_matched<br>o bad input |
| AH | name | Name of the supplier in the source CSV file or Procurement. |
| AI | url | URL of the supplier in the source CSV file or Procurement. |
| AJ | notes | Any other notes or comments added in the source CSV file. |
| AK | street1 | Address of the supplier in the source CSV file or Procurement. |
| AL | city | City in which the supplier is located in the source CSV file or Procurement. |
| AM | state | State in which the supplier is located. |
| AN | country | Country in which the supplier is located. |
| AO | zipcode | Zipcode in which the supplier is located. |

For details on the match report, see *Data Diagnostics Report*.

After you review the match report, you can make changes to the matches DataFox found. If you don't have any changes to make, you can publish the matches to Procurement. All the matches with Verified status are published and the suppliers are linked with the matched companies. For details on publishing matches, see *Publish Matches to Oracle Fusion Cloud Procurement*.

## Make Changes to the Matches

While reviewing the match report, check if you need to modify any matches that DataFox made. Here are some examples of the types of edits you can make in the match report:

- Remove duplicate suppliers: Filter the duplicate group column in the match report to find duplicate suppliers. Any supplier record with duplicates is categorized under one group with a unique ID, for example, D4. After you filter and find duplicates of a supplier, you can delete the rows in the match report to remove the duplicates.

- Verify the potential matches: Check for suppliers in the Probable Match bucket and verify if you want to match them with the companies DataFox found. Check the columns Potential Match name and Potential Match URL. If you want to confirm the match that DataFox has found, copy the Potential Match DataFox ID value and paste it in the datafox_id column.
- Find matches for unmatched suppliers: Check for suppliers in the Unmatched bucket and see if you want to match them with any companies. In DataFox, search for and find the companies that you want to match to your suppliers. Copy the company's DataFox ID field value and paste it in the datafox_id column of the match report.
- Modify the matches that DataFox found: Verify and change any other matches that DataFox made. In DataFox, search for and find the companies that you want to match to your suppliers. Copy the company's DataFox ID field value and paste it in the datafox_id column of the match report.
- Select the suppliers to sync: Select the suppliers you want to sync if you don't want to enrich all the suppliers that DataFox found a match for. You can delete the rows in the match report that you don't want to publish to Procurement.

After you edit the match report, publish the matches to Procurement. To do this, you need to create a Link Records project and publish the matches from the new project. You need to prepare a CSV file for the link project using the datafox_id and name columns in the match report. For details, see *Link Records*.

For details on how to publish the matches, see *Publish Matches to Oracle Fusion Cloud Procurement*.

## Make Changes in the Procurement Application

You can use the match report to clean your supplier profiles. Here are some of the changes you can make:

- Use the Duplicate Group column to identify duplicate suppliers and delete them.
- Modify supplier names based on the matches DataFox finds.
- Use the Potential Match URL column and add corporate website details.

# Publish Matches to Oracle Fusion Cloud Procurement

After you review the match report that DataFox generates, the next step is to publish the match results. Publishing the matches links your suppliers to DataFox companies and enriches your suppliers.

If you edit the match report that DataFox generates, create a Link Records project with the edited match report as the source. For details, see *Link Records*. If you make changes in Procurement based on the match report, create another matching project with Procurement as the source. Here's how you can publish matches of the matching or link project:

1. In the DataFox app, click your user name, and then click **Settings**.
2. Click **Matching & Linking**.
3. On the All Projects page, click the project that you created.
4. On the details page, click **Publish to Procurement Cloud & Exclude Duplicates** to leave out the matches with the Duplicate status and publish the rest of the matches.

If DataFox can't publish all the matches, it generates an Exceptions Report and the status of the project is Completed with Errors. You can review the report and take an appropriate action based on the errors.

# Link Records

You can link suppliers with the DataFox companies that you want, instead of DataFox matching them for you. You can use this feature if you have new suppliers that you want to link instead of running a matching project on all the suppliers.

To link suppliers, you need to prepare a CSV file with these columns:

| Column in Excel | Column Name | Description |
|---|---|---|
| A | DataFoxCompanyId | The DataFox company ID that you want to link to the supplier. You can get these IDs from previous matching project reports or from the DataFox app. |
| B | IntCompanyId | The supplier number that you want to link to the DataFox company. |

Here's how you can manually link suppliers with companies:

1. In the DataFox app, click your user name, and then click **Settings**.
2. Click **Matching & Linking**.
3. On the All Projects page, click **Link**.
4. From the list, select **Link Records**.
5. Enter details in the Select Records to Link dialog box.
    - In the **Name** field, enter a name for the link project
    - In the **Linked Rows File** field, drag and drop the CSV file with the IDs.
6. Click **Link**.

The link project starts and you can see the status on the details page. You can view the details of the project at any time by clicking the project on the All Projects page. After the link project is complete, you can see the status Completed Successfully or Completed with errors. If the project is completed with errors, you can review the error report and take an appropriate action based on the errors.

# Delink Synced Records

You can delink your suppliers from DataFox companies if you don’t want DataFox to enrich those suppliers anymore. To delink suppliers and companies, you need a source CSV file with one column as shown here:

| Column in Excel | Column Name | Description |
|---|---|---|
| A | IntCompanyId | The supplier number that you want to delink from the linked DataFox company. |

Here’s how you can delink suppliers and companies:

1. In the DataFox app, click your user name, and then click **Settings**.
2. Click **Matching & Linking**.
3. On the All Projects page, click **Link**.

4. From the list, select **Delink Records**.
5. Enter details in the Select Records to Link dialog box.
    - In the **Name** field, enter a name for the link project.
    - In the **Delinked Rows File** field, drag and drop the CSV file with the IDs.
6. Click **Delink**.

The delink project starts and you can see the status on the details page. You can view the details of the project at any time by clicking the project on the Matching Projects page. After the delink project is complete, you can see the status Completed Successfully.

# 6 Scoring

## Overview of Supplier Scoring

You can use scoring to estimate supplier risk. Each company receives a score based on the criteria and the weights assigned to the criteria. Negative score for a company implies that it's prone to risks. A template with criteria and weights is available in DataFox. Use the template to build your scoring model and modify the weights and criteria if necessary.

If you want to change the criteria, you can change from a broad range of signals and firmographic data and design a scoring model to meet your unique needs and risk priorities.

Let's look at some example filters that are used to set the scoring criteria:

- Financial Info, such as revenue.
- Signals data, such as corporate updates or negative news.

DataFox provides hundreds of criteria types for scoring. Assign weights to these criteria to determine the score for a company.

## Set Up Scoring

After you select your criteria and filters, you're ready to set up scoring.

Here's the list of tasks to set up scoring:

1. Set up scoring criteria.
2. Preview and iterate the scoring criteria.
3. Publish the scoring criteria.
4. Assign scoring criteria sets.

Optionally, you can create multiple criteria sets and assign them to different users but it's recommended that you don't create multiple criteria sets. A scoring template to identify high-risk suppliers is available to build a scoring model. Multiple criteria sets aren't the best way to identify high-risk suppliers.

You can create up to three criteria sets and assign different weights to each criteria. The first set you create is the default criteria set and is assigned to all users, but you can change the default set from the **Settings** > **Scoring** > **Default Criteria Set** page. If you want different users to view scores from different criteria sets in DataFox, you can change the criteria set assigned to them. Go to **Settings Team Management** and from the Criteria Set list for each user, select the set that you want to assign.

The scores that are synced to Procurement are the scores of the criteria set assigned to the account owner.

After you create a criteria set, you can't delete it. However, you can delete all the criteria within a set so that it doesn't apply to any supplier.

# Set Up Scoring Criteria

You need to set up criteria for scoring. Let's look at some examples of filters you can use to set the scoring criteria:

- A firmographic data point, such as headcount, location, or industry keywords.
- Signals data, such as financial signals, including earnings and mergers.

Here's how you can set up the criteria.

1. Sign in to Oracle DataFox and click the Scoring tab.
2. On the Manage Criteria page, select **Use template**.
3. Edit the weights of the displayed criteria or add more criteria to the set.
    - On the Weight column, click **Edit** to edit the default weights. You can enter both positive and negative weights.
    - Click the Weight list to change weights for each criterion.
    - Click Add Criteria to add more criteria to the set or click the Delete icon to delete a criterion.
4. Click **Preview Scores** to preview your score after you've finished editing the criteria.

# Preview and Iterate Scoring Criteria

Preview your criteria with sample lists to check accuracy.

1. On the Scoring page, click the Preview Scores tab to review the score.
2. In the Choose sample companies section, click **Choose a sample group** and select your list with suppliers linked to DataFox companies.

   If you've already set up a sample earlier and want to change the sample, click **Change**.
3. In the Choose Sample Companies dialog box, enter the name of the list of companies linked to supplier profiles.
4. Click **Done**.
5. In the Preview section, click **Preview Scores** to review the scores for your sample groups.

You can preview the scores in a distribution chart and Company scores table.

See *Best Practices for Scoring* for things to keep in mind while reviewing the scoring criteria.

## Iterate Your Scoring Criteria

After you preview your scores, you can iterate the criteria and weights for a fine-tuned result. You can iterate instantly without waiting for the scores to be published for calculation. Here's how.

1. From the Draft Criteria tab, click the Manage Criteria tab.
2. Add more filter criteria or edit the existing criteria.
    a. Select **Add Criteria** to add more filter criteria.
    b. Select a different weight from the **Weight** list to edit weights of the existing criteria.
3. Click **Preview Scores** to see how your changes affected the graph.

The preview might take several minutes to be generated.

## Publish Scoring Criteria

From the Manage Criteria tab, click **Publish**. The scores are queued to publish, and the publish time varies based on the number of criteria. It usually takes up to 24 hours for the scores to be published and the scores are synced to Procurement in that day's bulk sync.

If you publish more than once, you can always review your current score while your new scores are being calculated. Go to the Companies tab and view the **Score** column to review. If there's an asterisk next to the score for a company, it indicates that it's the current score and that the score is being recalculated.

# Best Practices for Scoring

Here are some best practices to keep in mind while building criteria for your score.

## Learn the Basics

- Learn how to create at least one of the key types of criteria, such as a prebuilt list, signals data, firmographic data, and more. For details, see *Set Up Scoring*.
- Before you start setting up your scoring criteria, do your research. Build a scoring model that meets your organization's unique requirements.

## Analyze and Reiterate

- Use your research to analyze and understand your organization's priorities. Identify risk elements that are most important to your organization so that you can build a personalized model. For example, for your organization, you identify the criteria company acquisition as a greater risk than leadership change. In this case, ensure that you assign a lower weight to the company acquisition criteria than to the leadership change criteria.
- After you set up your criteria and publish your scores for the first time, analyze your scores and improve them.
    - Consider aspects such as geography, industry, revenue, and so on. Let's say you assigned a score of 45 points for suppliers that have a revenue of more than 5 billion USD. When you publish the results, you notice that suppliers based out of FATF monitored countries also show high scores because they meet the revenue criteria. You decide to add another criteria and assign a weight of -60 points to suppliers based out of FATF monitored countries.
    - Preview your scores in the distribution chart on the Preview Scores tab. The chart might indicate issues with your scoring that you might need to address. For example, if you see that most of your suppliers have negative scoring, you know there's something wrong with your scoring model.
    - Define a scoring model that assigns each supplier with a base score. This helps you identify suppliers with high risks easily. Negative score indicates that the supplier is a high-risk one. The lower the score, the higher the risk.
- Review and normalize your criteria for supplier variation. For example, if a company had litigations recently, its score might be low even though this might be a nonissue considering its financial standing. To normalize the scoring, you can add another criteria for companies with over 5 billion USD revenue and assign a positive weight. This balances the negative weight and moves the company to the lower risk category.

## Share and Update

After you publish your criteria, have your teams use scores to identify high-risk suppliers. Collect their feedback and adjust your criteria set as required.

# Example of Scoring Setup for Supplier Risk Management

This table shows an example of criteria you can apply to identify suppliers with high risk. You can set the time frame to either last 3 months or 1 year for each criteria.

| Criteria | Weight |
|---|---|
| Revenue more than $5B | 45 |
| Revenue between $500M to $5B | 30 |
| Revenue between $100M to $500M | 10 |
| Revenue up to $100M | 5 |
| Leadership Change | -6 |
| Reorganization or Name Change | -6 |
| Was Acquired | -11 |
| Regulatory Issues | -11 |
| Bankruptcy | -11 |
| Security Challenges | -11 |
| Outsourcing | -11 |
| Legal Issues | -11 |
| Layoffs | -11 |
| Special Risk: Fin Services below $500M, Iceland, Crypto Exposure | -21 |
| Company Turbulence | -31 |
| Strategic Category: Cybersecurity software with revenue greater than $5B | -40 |
| Geographic Risk: FATF Monitored Countries | -60 |

# 7 Signals and Alerts

## Supplier Signals

Signals from DataFox are like newsfeed of the key milestones of suppliers. You can get daily updates about suppliers that matter to you and use this information to assess risks and take corrective actions sooner.

You can get updates about important information such as bankruptcy, financial challenges, revenue, stock performance, and ownership change in companies.

To view signals in the Datafox app, navigate to the company's profile and click the Signals tab. You can also set up alerts to receive signals. For details, see *Signal Alerts*.

### Signal Types

This table lists different signal types available in Oracle Fusion Cloud Procurement. Select any of these signal types to set up alerts.

| Signal Category | Signal Type | API Tag | What Triggers This Signal |
|---|---|---|---|
| Financial | Earnings, Revenue, Stock Performance, or Dividends | earnings, revenue, stock-performance, analyst-expectations, valuation, dividends | Company releases numbers on their performance |
| | Made an Acquisition | acquisition-acquirer | A company acquires another company |
| | Debt Financing | debt-financing | Company receives a loan they have promised to repay |
| | SEC and Regulatory Filings | form-5500, form-10k, form-d | Company files required legal paperwork |
| | Invested in a Company | investment | A company invests in another company |
| | IPO or Public Offering | ipo-trading, ipo-s1, ipo-speculation | A company invests in IPO or file to IPO |
| | Merger, Restructuring, or Ownership Change | merger, restructuring, ownership-change | Company undergoes financial restructuring |
| | Received Private Funding | private-funding | Company raises money in exchange for equity |
| | Was Acquired | acquisition-acquiree | A company is acquired |
| Corporate Updates | Purchased or Became a Customer | corporate-purchase | Company purchases a product or subscribes to a service |
| | Outsourcing | outsourcing | Company subcontracts to other companies or contractors |
| | Real Estate Sale or Relocation | real-estate-sale, relocation | Company sells their office or moves to a new location |
| | Reorganization or Name Change | reorganization, name-change | Company alters the corporate structure or changes their name |

| Signal Category | Signal Type | API Tag | What Triggers This Signal |
|---|---|---|---|
| Negative News | Bankruptcy | bankruptcy | Company files for bankruptcy |
| | Industry or Competitive | industry-challenge, competitive-challenge | Company's competitors gain a unique advantage or the market downturns |
| | Customer Dissatisfaction | customer-dissatisfaction | Company's customers voice their dissatisfaction online |
| | Financial Challenges | financial-challenge | Company reports signs of financial instability |
| | Executive or Key Person Departure | key-departure | Company loses or fires an executive |
| | Layoffs | layoff | Company terminates several employee contracts |
| | Legal Issues | legal-issue | Company has experienced legal difficulties |
| | Regulatory Issues | regulatory-issue | Company encounters problems with governing law |
| | Security Challenges | security-challenge | Company reports or is tied to security vulnerabilities |
| | Turbulence | turbulence | Company exhibits signs of irregular or ailing behavior |

# Signal Alerts

You can configure alerts to receive company signals in your inbox or on Slack.

To set up alerts and edit the news alerts you receive about your suppliers, you must create and use a dynamic list of companies that are linked to supplier profiles. For details, see *Create a List of Companies Linked to Supplier Profiles*. After you create a list, you can set up alerts using the list. For details, see *Set Up Alerts for Supplier Signals*.

## Create a List of Companies Linked to Supplier Profiles

You can make lists of companies on the Lists page in DataFox. You can specify certain criteria and all the companies that meet the criteria are added to your list. Dynamic lists in DataFox are saved and when a company satisfies your list criteria, it's automatically added to your list. You can also create static lists in DataFox, but they are not relevant to Procurement.

Here's how you can create a list of companies linked to supplier profiles:

1. Sign in to Oracle DataFox.
2. Click the Lists tab.
3. On the Lists page, click **Create Dynamic List**.
4. On the Company Search page, click **Add a Filter**.
5. In the Filter Companies dialog box, go to **Custom Data** > **Oracle Procurement Cloud**.
6. Select **Accounts synced to Oracle Procurement Cloud** and click **Apply**.
7. On the Company Search page, select all the companies and click **Create Dynamic List**.
8. In the Create Dynamic List dialog box, enter a name and a description for the list.
9. Click **Create Dynamic List**.

You now have a dynamic list that contains all the DataFox companies that are linked to suppliers. Suppliers that are matched and linked after you create the list, automatically become a part of the list. You can use this list to set up alerts. See *Signal Alerts*.

### Share Lists to Collaborate with Your Team

You can share the lists you create with your team so that they can view and make any changes if required.

1. Sign in to Oracle DataFox and go to **Lists** > **My Lists**.
2. Click the list you want to share.
3. Click the **Manage sharing** icon.
4. In the List Sharing Settings dialog box, enter the email addresses of the people you want to share the list with.

   > **Note:** You could also click **Share With Everyone** to share the list with your entire team. However, it's recommended you do that only if you have a small team.

5. Click **Send Invitations**.

## Set Up Alerts for Supplier Signals

It's simple to manage signal alerts on a dynamic list. You can set up alerts in the Signal Alert Preferences dialog box from the Lists page, from a specific list, or from the Manage Alerts page.

1. Open the Signal Alert Preferences dialog box in one of these ways:
   - On the Lists page, click the **Get Alerts** icon in the **Actions** column.
   - After you open a list, click the **Get Alerts** icon.
   - From the user menu, click **Alerts**. On the Manage Alerts page, select a list from the Static Lists or Dynamic Lists tab.
2. In the Signal Alert Preferences dialog box, in the **Send Alerts Via** list, select how you want to receive your alerts. If you want to receive alerts on Slack, see *Integrate Slack with Oracle DataFox*.
3. Select the types of alerts you want to receive.

   > **Note:** Select alerts from the corporate update, financial, or negative news categories. These are the only signal types that apply to you. For details, see Signal Types in *Signal Alerts*.

4. For each of these categories, select **Notify me when a new company matches my search criteria** to receive an alert when a new supplier profile is enriched.
5. Click **Save Alert Preferences**.

To stop receiving alerts, click the **Get Alerts** icon and select **Delete This Alert**.

### Share Alerts with Your Team

You can receive alerts for supplier signals through email or Slack and share them with your team members who don't have DataFox user accounts. Here are the different ways to share alerts:

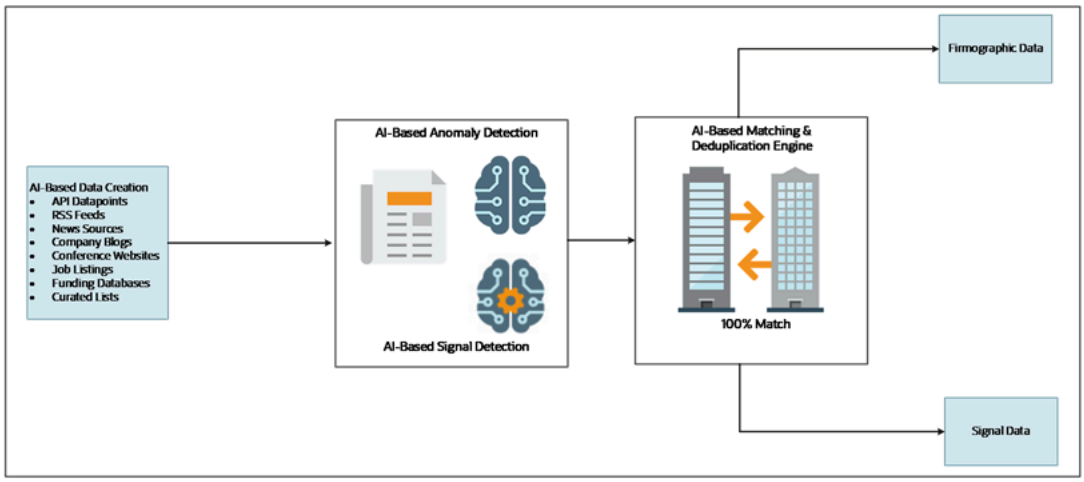
- Create an internal distribution list on your email service and add it as an account in DataFox.
- Set up a rule to forward emails from DataFox to a distribution list.
- Create a public Slack channel and set alerts to go to the channel.

# 8 Data Diagnostics

## Overview of Data Diagnostics and Enrichment

Data diagnosis is the first step in establishing a solid data foundation. After you complete integration, create a matching project in DataFox to diagnose data and match suppliers with companies.

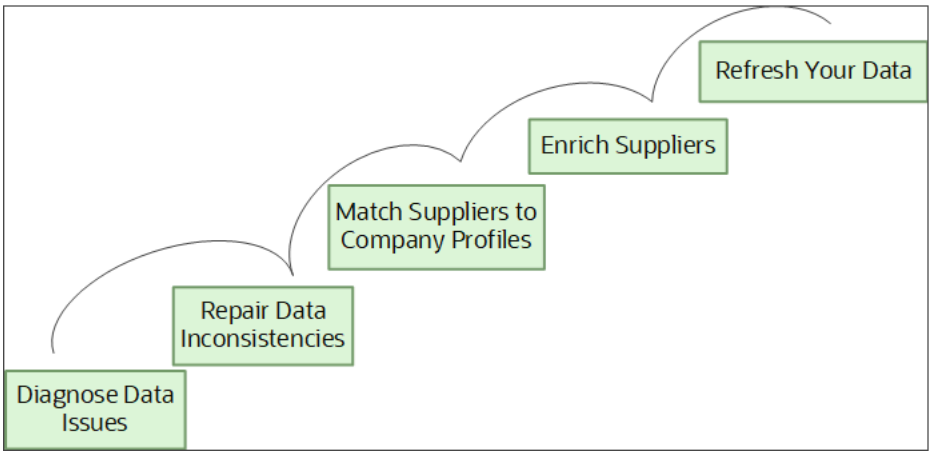
This image shows how data flows through the DataFox platform.




Signal and anomaly detection tools that are AI-based diagnose the data extracted from different sources. A series of algorithms detects each type of error and flags anomalies that may or may not be actual problems. After you validate and resolve the anomalies, a series of algorithms matches the data to Oracle DataFox company records. The result of this process is accurate firmographic and signal data.

## Foundation of Data Diagnostics

Let's look at how data diagnostics lays the foundation for enrichment of your organization's data.




## Diagnose Data Issues

Oracle DataFox diagnoses data issues while matching your records to company profiles. This table lists the different types of diagnostic results.

| Diagnosis Type | Definition | Example |
|---|---|---|
| Match Rate Assessment | Percentage of supplier profiles that match an Oracle DataFox company record. Each record is validated rigorously using AI-based algorithms. | Summary:<br><br>Match: 35176 records (91.5%)<br><br>Probable Match: 72 records (0.2%)<br><br>Unmatched: 3194 records (8.3%) |
| Fill Rate Assessment | Percentage of matched records that can be enriched for each data field type. | A fill rate of 100% for the URL field implies that 100% of the matched records contain data in the URL field. |
| Signal Counts Assessment | Evaluates the matched records to display the total number of signal counts over the past year. | Out of 2122 signal counts, signal count for the Corporate Update: Outsorcing signal type in one year is 47. |

After the diagnosis, a report displays all the data inconsistencies.

## Repair Data Inconsistencies

After you have diagnosed your records to identify anomalies, you can opt to repair these data inconsistencies. To know more on how Oracle DataFox repairs data anomalies, see *Data Diagnostics Report*.

## Match Records to Company Profiles

Match your records with Oracle DataFox companies to set up an automated data management system. Oracle DataFox uses AI-based matching tools and algorithms to match data. To know more, see *How DataFox Matching Works*.

## Enrich Records

Enrich your data with Oracle DataFox firmographic information and growth signals on profiles. After you approve the data matches, an Oracle DataFox analyst will send you a file with enriched data. Either you or an Oracle DataFox analyst can use this file to integrate the enriched data with your database.

After you set up DataFox Supplier Intelligence, an Oracle DataFox analyst runs the initial bulk sync and updates all the data into your database.

## Refresh Your Data

After you set up DataFox Supplier Intelligence, go to the Oracle DataFox Settings page and apply bulk sync settings to refresh your data periodically.

# Data Diagnostics Report

Oracle DataFox uses algorithms to inspect your company records for anomalies before enriching data. The algorithms match your records with DataFox company profiles and highlight data inconsistencies and duplicate records. You can get match reports in CSV format from matching projects you create in DataFox.

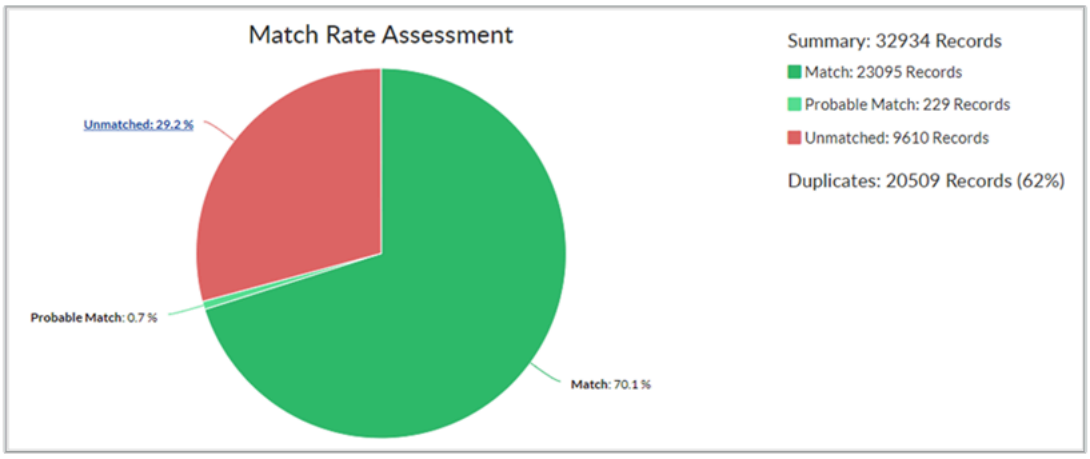
Let's walk through the categories in which data is diagnosed.

- Unmatched or Irregular: No high confidence match is found for this company record
- Duplicate: Two or more records exist for the same company
- Verified: Company records with categories Matched and Probable Match that are high confidence matches without data anomalies

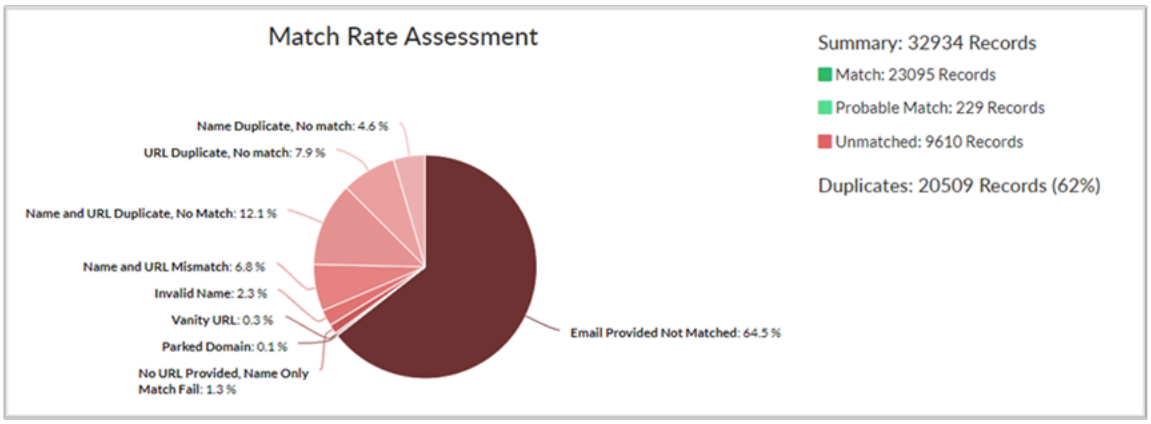
You can find the detailed status of these categories in the Bucket column of a match report. Here are the details of the different buckets.

- Matched: Match is found with a high score for this supplier.
- Not_Matched: No match is found with a high score for this supplier.
- Bad Input: No match is found with a high score because of data anomalies.

This screenshot shows the match rate assessment for sample company records in a pie chart.




This screenshot shows match rate assessment for the unmatched records.




Let's understand each of these categories.

## Unmatched or Irregular Anomaly

This table details the issues in the unmatched and irregular anomaly category. You can find this diagnostics type listed as Unmatched in the pie chart and Irregular in the CSV report.

| Issue Name (Pie Chart) | Issue Name (CSV file) | Description | Example | Action |
|---|---|---|---|---|
| Email Provided Not Matched | Email | The report highlights URLs that look like email addresses to prevent incorrect matching of companies such as Google, Yahoo or any other major email domain provider. | • Company name: Blue Semiconductor<br>Email: bluesemiconductor@gmail.cc<br>• Company name: First Software Email: firstsoftware@yahoo.fr | Edit and update the URL to resubmit for matching or ignore the error. Your company isn't matched if you ignore the error. |

| Issue Name (Pie Chart) | Issue Name (CSV file) | Description | Example | Action |
|---|---|---|---|---|
| NA | Human Matching | Because of a low confidence score, an Oracle DataFox analyst is required to review and confirm the match for this issue type. This issue type if applicable, is mentioned only in the CSV report. | • Company name: PennyPack Systems<br>URL: www.pennypacksystems.com.au redirects to pennypack.com.au<br>• Company name: Large and Associates<br>URL www.largeandassociates.de redirects to largeassociates.de | Edit and provide the correct information or ignore the error. Your company isn't matched if you ignore the error. |
| Invalid Name | Invalid name | The company name is incomprehensible. | • BNA c/o<br>• Hamilton + Partners<br>• VidaXL (SH)<br>• POL | Edit and provide the invalid name to resubmit for matching or ignore the error. Your company isn't matched if you ignore the error. |
| Invalid URL | Invalid URL | Corrupt or incorrectly formatted URL that doesn't direct to a company website. | • http:<br>• http:// visioncorporation.ccom<br>• http:''visioncorporation...com<br>• no url<br>• n-a | Find correct URLs and then resubmit to Oracle DataFox for matching or skip the records. Your company isn't matched if you skip the record. |
| Name and URL Mismatch | Mismatched Query Data | Oracle DataFox detects cases where the company name points to one company and the URL points to another. Often, these cases are just fine, but they're flagged so you can decide how to handle them. | • Company name: Fantastic Laptops<br>URL: greencorp.com<br>• Company name: Spruce Street Foods<br>URL: firstsoftware.de | Check the results and determine whether you want Oracle DataFox to match to the company name or to the URL. If not, ignore the error. Your company isn't matched if you ignore the error. |
| No URL Provided, Name Only Match Fail | Missing URL | The company record contains a common name but doesn't include a web link. | • Company name: Green Corp.<br>URL: NA | Edit and provide the URL to resubmit for matching or ignore the error. Your company isn't matched if you ignore the error. |
| No URL Match | No URL Match | The URL for this company record doesn't match any Oracle DataFox company URL | NA | Check if the URL is correct. If it's correct, raise a request to get the company added. |
| Parked Domain | Parked Domain | Oracle DataFox's matching algorithm detects if the | • pennypacksystems.com redirects to bigcomputers.com | Edit and update the URL to resubmit for matching or ignore the error. Your |

| Issue Name (Pie Chart) | Issue Name (CSV file) | Description | Example | Action |
|---|---|---|---|---|
| | | URL redirects to a parked domain.<br><br>Identifying parked domains can also indicate if a company has gone out of business or changed its URL domain. | • bluesemiconductor.com redirects to visioncorporation.com | company isn't matched if you ignore the error. |
| Shortened URL | Shortened URL | Sometimes, company records contain a URL shortcut, rather than the company's actual URL. | • bit.ly/abc<br>• ow.ly/xyz | Find the correct URL and then submit to Oracle DataFox for matching or ignore these records. Your company isn't matched if you ignore the record. |
| Vanity URL | Vanity URL | Identifies organizations that maintain a profile and classifies them as vanity URLs. Vanity URLs indicate if a company is small or has a minimal web presence. | • Vanity profile for Seven Corporation<br>• Vanity profile for PennyPack Systems | Check the results. In some cases, the Vanity URL is replaced by the actual company website URL. In other cases, it's an obscure company without its own website. |

## Duplicate Anomaly

You can find the records marked as duplicate in both the CSV and pie chart reports. This table details the issues in the duplicate anomaly category.

| Issue Name (Pie Chart) | Issue Name (CSV file) | Description | Example | Action |
|---|---|---|---|---|
| Name Duplicate, No match | Name Duplicate | Two or more different companies share the same name. Here's the list of scenarios when duplicate name issues occur.<br>• Duplicate records for the same company.<br>• Different companies with the same name.<br>• Fake placeholder names. | • Three records named as First Software<br>• Multiple companies named as Big Computers<br>• Multiple records are named XYZ, No Name, NewCo, or Test. | • Link or merge the records in your application.<br>• Ignore. There's nothing wrong.<br>• Find the correct name of the company or flag the records as dubious. |
| NA | Name and URL Duplicate | Two different company records share the same name and URL. | • Name: Blue Semiconductor<br><br>URL: bluesemiconductor.com | Merge or link the company records. |

| Issue Name (Pie Chart) | Issue Name (CSV file) | Description | Example | Action |
|---|---|---|---|---|
| | | | • Name: Blue Semiconductor<br>URL: bluesemiconductor.com | |
| NA | Post-match Duplicate | Some company records are duplicates even if the company names and URLs appear to be different. This may occur if the same company has multiple names and URLs. Oracle DataFox company profiles store all the names and domains and hence, it's possible to detect the post-match duplicates. | • Spruce Street Foods<br>URL: sprucestreetfoods.com<br>• Spruce Foods<br>URL: ssf.com<br>For example, the system knows sprucestreetfoods.com and ssf.com are owned by Spruce Street Foods, and Spruce Foods is a division of Spruce Street Foods. | Link or merge the records in your application. |
| NA | Redirected URL Duplicate | Oracle DataFox matching algorithm detects if a given URL redirects to an entirely different URL or to the same URL in another record. | pennypack.com and pennysystems.com both redirect to pennypacksystems.com. | Link or merge the records in your application. |
| URL Duplicate, No match | URL Duplicate | Two or more companies have the same URL domains. | Spruce Street Foods and Spruce Foods both have the same URL domain www.sprucestreetfoods.com. | Link or merge the records in your application. |

## Verified

Your company records can return without any anomalies and pass as verified. You can find these records only in the CSV report. Here's the list of scenarios when your company records are classified as verified.

| Scenario | Description | Example | Action |
|---|---|---|---|
| Auto Matched | Your record matches with an Oracle DataFox record with a high confidence score. | Input name, Tall Manufacturing Inc. is matched with the Oracle DataFox name, Tall Manufacturing | No action necessary. Your record is ready to be enriched with Oracle DataFox info. |
| Matched By Humans | Your record passed the anomaly tests, but the company records didn't match an Oracle DataFox company profile with high confidence score. Either the company record points to more than one company or Oracle DataFox needs to create a company profile. | Input name, TM Software is matched with the Oracle DataFox name, Tall Manufacturing | No immediate action is necessary. These scenarios require a specialist to look at the records and verify. |

| Scenario | Description | Example | Action |
|---|---|---|---|
| Already Matched | Company records are matched and rematched multiple times. This status implies that the record was matched earlier during a prior matching process, and no anomalies were detected. | Input name, Oracle is matched with the DataFox name, Oracle | No action is needed. |

# How DataFox Matching Works

The algorithms match company names and URL records to establish a match between suppliers and companies in Oracle DataFox.

It's important to standardize your records before searching for potential matching companies. For example, removing common designations like Corporation and LLC, and standardizing www.oracle.com/index.html as oracle.com.

The matching tools also update and match outdated company names and URLs from your records. For example, a record with an outdated company name is identified and matched with the Oracle DataFox company name that has the latest branding.

This table shows examples of how data is matched. The values mentioned in these columns are examples.

| Match Type | Name in Oracle Fusion Cloud Procurement | URL in Oracle Fusion Cloud Procurement | Oracle DataFox Name | Oracle DataFox URL | Result |
|---|---|---|---|---|---|
| Match | Seven Corporation | NA | Seven Corporation | www.sevencorporation. | This example is a straightforward auto match. Even though there was no customer-provided URL, the name of Seven Corporation was enough to ensure a match. |
| | Fantastic Laptops | www.fantasticlaptops.c fcom/officelist | F-Laptops Co. Ltd. | www.fantasticlaptops.c | This is an auto match and the URL is standardized. |
| Probable Match | PennyPack Systems | https:// www.pennypacksystem | Penny Systems | www.pennysystems.cor | Oracle DataFox found the correct name and updated the URL. |
| Duplicate | Tall Manufacturing | NA | Tall Manufacturing | tallmanufacturing.com | Matched to same Oracle DataFox ID, but |

| Match Type | Name in Oracle Fusion Cloud Procurement | URL in Oracle Fusion Cloud Procurement | Oracle DataFox Name | Oracle DataFox URL | Result |
|---|---|---|---|---|---|
| | | | | | two different records exist. |
| | Tall Manufacturing | www.tallmanufacturing | Tall Manufacturing | tallmanufacturing.com | Matched to same Oracle DataFox ID, but two different records exist. |
| Unmatched | Large and Associates | NA | NA | NA | Not a legitimate company. |
| | Large and Associates | www.largeandassociate | Large and Associates | largeandassociates.com | Name and URL don't match. |

# 9 Workflow Integrations

## Spreadsheets Imports and Exports

Oracle DataFox lets you import and export lists using spreadsheets. You can also import Oracle DataFox columns with custom data in bulk.

## Import Lists to Oracle DataFox

You can import your list of suppliers from a spreadsheet to create a static list.

### Before You Import Lists to Oracle DataFox

Make sure that you check these points about your spreadsheet file before importing to Oracle DataFox:

- The file has less than 50,000 rows so that your import is successful.
- The name of the file doesn't contain numbers, spaces, or special characters.
- The file doesn't have any fields with Personally Identifiable Information (PII). PII is any information that's used to uniquely identify a contact or locate a person such as social security numbers, addresses, phone numbers, and so on. DataFox doesn't use any PII data to filter companies or score them.

### Why Import?

Importing lists, for example, lets you select from several fields beyond names and URLs. You can create mappings to existing columns or create new ones.

You can take your spreadsheets with supplier names and URLs and enrich it with data. You can immediately export it as a CSV file without saving it as a list in Oracle DataFox.

You can also view any of your previous uploads in the History tab.

Let's look at different methods to upload company lists. Upload List is accessible from anywhere in Oracle DataFox.

### Option 1: Import List

1. On the Lists page, click **Upload List**.
2. On the Upload Company List page, click **Import list and save to DataFox** and click **Next**.
3. Select and add your file.
4. Optionally, enter a name and description.
5. Click **Next**.

The upload process begins. Messages appear indicating the status and when the upload is successful, a confirmation message appears.

You can use this option and import lists to compare records with your application, filter lists, get alerts, and much more.

### Option 2: Upload List for Enriched CSV

Use this option if you want to view lists in Excel. The CSV files retain original supplier names and URLs, and provide firmographic information (like location, headcount, revenue).

1. On the Upload a Company List page, click **Upload to get an enriched CSV**.
2. Upload your Excel or CSV list directly or drag and drop the files.

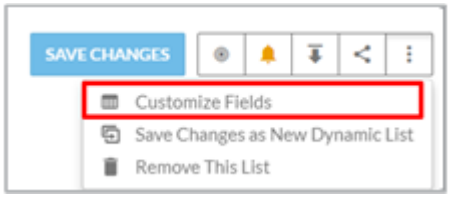
   Unlike the first option, however, you won't name or describe the file.

## Download and Extract Company Info to CSV

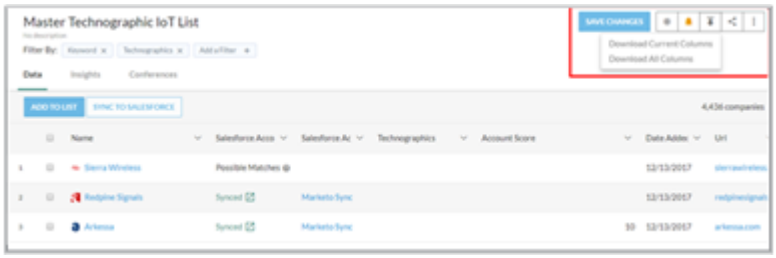
You can download company info in a DataFox list to a CSV file.

1. Sign in to Oracle DataFox and click Lists.
2. Select the list that you want to download.

   If you need to create a custom or a dynamic list, you must first set filters or check relevant companies. After you set filters, you can click **Create Dynamic List** on the Lists page or **Add to List** from a list to download data from your saved lists.
3. Optionally, to modify the columns to download, select **Customize Fields** or **Add Data Columns**.




4. Click **Download** and select one of these options:
   - **Download current columns** to download the columns in the list.
   - **Download all columns** to download all the columns in the Customize Fields dialog box.




5. In the Download Ready dialog box, click the name of the file to download it.

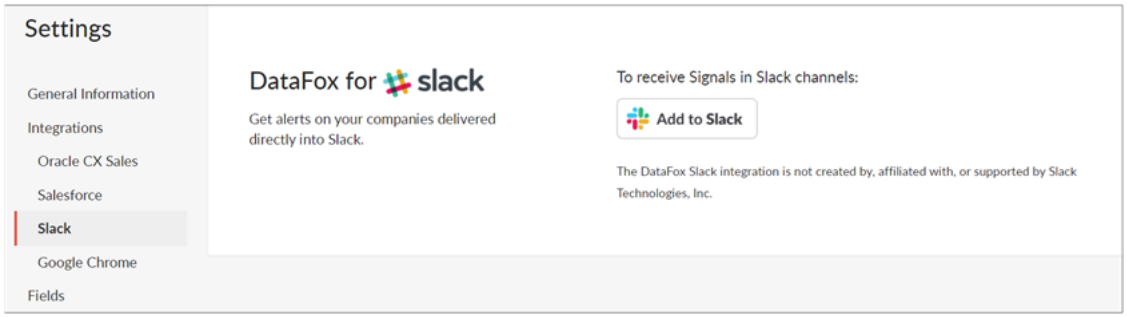
# Integrate Slack with Oracle DataFox

Slack is a useful communication tool for companies of all sizes. Now, you can integrate it with Oracle DataFox for greater accessibility and ease of use.

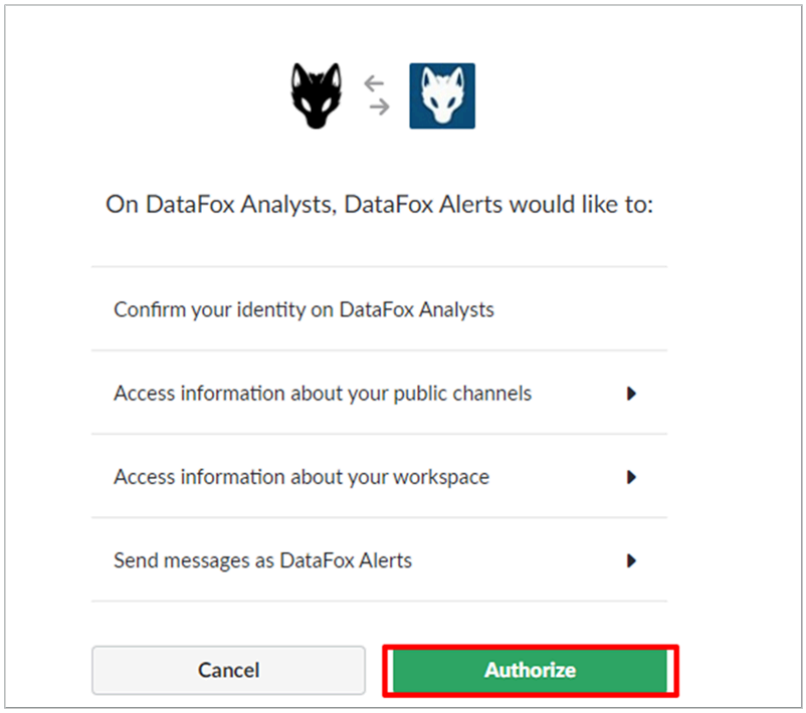
# Connect Your Oracle DataFox Account to Slack

1. Sign in to Oracle DataFox.
2. Click your user name, and then click **Settings**.
3. Click the Integrations tab.

   Initially, you must connect to the Support channel. In this case, DataFox requests authorization to integrate with your own Slack channels.
4. On the DataFox for Slack page, click **Add to Slack**.




5. Click **Authorize**.

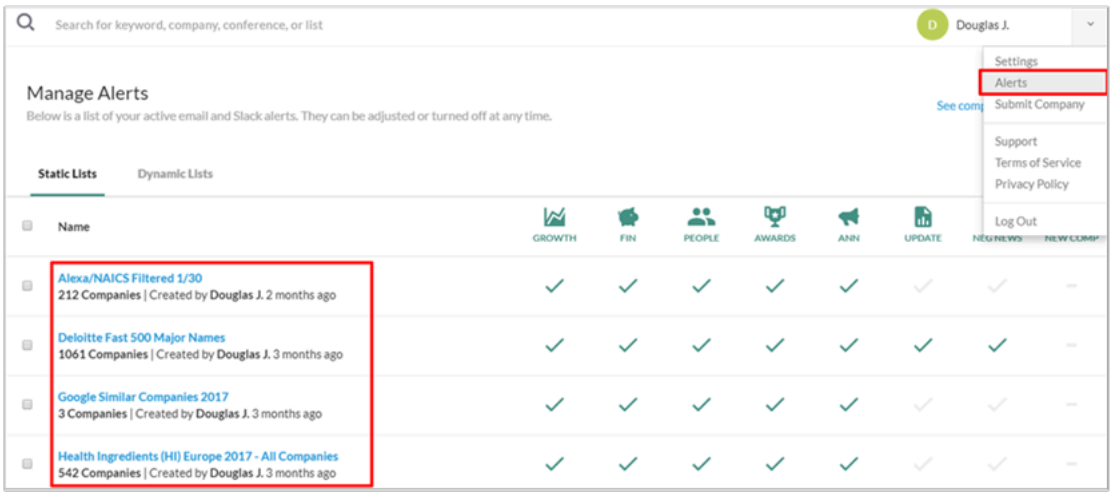



> **Note:** To authenticate Oracle DataFox for Slack, you need to have Slack permissions to add Apps and Custom Integrations to your Slack team.

You should now receive an Oracle DataFox welcome message in Slack (from slackbot). This confirms that Slack and Oracle DataFox synced properly.

# Determine Which Alerts go to Slack

1. Sign in to Oracle DataFox.
2. Click your user name, and then click **Alerts**. In the Manage Alerts page, you can see the type and frequency of each alert next to the names of lists and dynamic lists.
3. Click any of the alerts listed to edit the alert.




# Set Alerts to go to a Slack Channel or Slack User

To enable the Slack integration, set the frequency of your alerts to **Instant (Slack)**, and then enter the public Slack channel or the Slack member ID you would like these news alerts to go to. The **Slack Channel** text box auto-suggests channels already active in your Slack team. To copy a member ID, navigate to the profile within Slack and click the **More actions** icon.

> **Note:** You can only get an alert into a private channel if you're the person who set up your company's Slack configuration. Everyone else must put them in public channels.

# Confirm that the Instant Alert is Set Up

There's an easy way to verify the alert is set to the channel correctly. Every time you change your alert settings, you get a notification in Slack.

So, if you turn on a category like corporate updates or turn off a category like negative news, and then click **Save**, you get a message in your Slack channel notifying you that your settings have been updated.

You should now see alerts in your Slack channels.

# Review Your Alerts

# Optional: Set Up Your Team Role

You can set up Slack for your team.

By sending personalized alerts to distinct Slack channels or to specific users on Slack, you can empower your team with company signals in their workflow. See *Slack Alerts*.

## Oracle DataFox for Slack Overview

By integrating Oracle DataFox Alerts with Slack, you get priority updates and actionable information.

# Receive Slack Notifications on Your List

Get instant notifications on your suppliers sent directly to you as a personal Slack message or to a Slack channel. These alerts are great for keeping tabs on risk-prone suppliers.

## Create a Public Channel in Slack

After you configure your Oracle DataFox platform for Slack integration, create a public channel in Slack. See *Integrate Slack with Oracle DataFox*.

> **Note:** If you have set up your company's Slack configuration, only you can create a private channel and receive alerts. All other users need to put them in public channels. For more information, see *Slack Alerts*.

## Set Up Alerts from a List or Dynamic List

1. After you create a channel, go to the list of companies linked to supplier profiles.

   See *Create a List of Companies Linked to Supplier Profiles*.
2. Click the **Alerts** icon.
3. In the Signal Alert Preferences dialog box, set the **Send Alerts Via** field to **Instant (Slack)**, and then enter the Slack member ID or channel to which you want to send alerts to.
4. Select the signal types that you want to receive alerts on.

   To copy a Slack member ID, navigate to the profile within Slack and click the **More actions** icon.

   > **Tip:** If you aren't seeing any alerts in Slack yet, make sure that you entered the correct channel name without the # sign.

## Confirm Slack Alerts Are Set Up

To confirm that your alerts are properly configured, click the assigned Slack channel and check for the confirmation message from Oracle DataFox.

You're now set to receive alerts on your lists and dynamic lists via Slack.

# Slack Alerts

Alerts are an important aspect of using Oracle DataFox. The application has a system of algorithms and human auditors who de-duplicate news articles, classify, and cluster similar concepts. Massive volumes of information is also distilled into a simplified feed with lower volume and higher quality insights. With the granular alert settings, you can toggle the news volume up and down to suit your preferences. For details on the offered signal types, see *Supplier Signals*.

Let's make sure that your integration is set up properly.

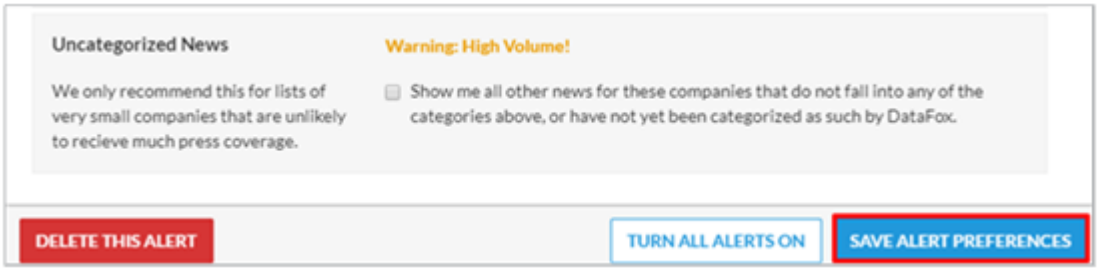
- On your Integrations settings page, make sure that the app is successfully connected.
- Make sure that the channel you created is public. Private channels in Slack have a lock icon next to them, and public channels have a # icon.
- Check that your alert settings worked. One quick test for this is to adjust your alert settings for one of your alerts (either on a list or dynamic list). Any time you change and save your alert settings, you should receive a confirmation in your Slack channel. To do this, select Alerts from the Profile icon in Oracle DataFox and toggle one of the Signal types on or off, and then click **Save**. You should receive a confirmation message when setting up your alerts.
- If you don't receive this confirmation message, then something is wrong with the integration. Make sure that you have performed the following actions:
    - Installed the Slack application correctly
    - Set your alerts to instant
    - Set the correct Slack channel in your alert settings
- If you do receive this confirmation message, then your integration is set up properly.
- If you're the person who set up your company's Slack configuration, you can create a private channel and receive alerts. All other users need to put them in public channels.

  See:

    - *Integrate Slack with Oracle DataFox*
    - *Receive Slack Notifications on Your List*

Here's how you can control alert volume:

- Broader Alert Types: Assuming you're already following all the companies you want, you can also expand the types of signals you receive alerts on. Go to the Alerts page and adjust which signal types you want alerts on.
- Click the bell icon and customize the type of signal alerts you receive.
- On the Alerts Settings page, toggle the option **Uncategorized News** to maximize the volume of signals you receive.




- Use caution when checking this alert, as it generates a high volume of information which may oversaturate your lead potential.

# 10 Frequently Asked Questions

## How Can I Request to Add a Company to Oracle DataFox?

You can submit a request to add a company that you don't find in Oracle DataFox.

To get the company added, on the user menu, click **Submit Company**. Enter the details of the company that you want added, and then click **Submit**.

It usually takes a few business days for Oracle Support to verify the company details and process the request.

## Can I Configure the Timeout Duration?

Oracle DataFox follows the standard SaaS timeout duration, so you have to sign in again after 1 hour of inactivity. You can't configure this duration in the application.

# 11 Common Terms and Field Descriptions

## Common Terms

Oracle DataFox uses a variety of phrases and key terms to define modules. Here are some of the most common:

- List: A sorted collection of companies.
- Private List: A list accessible to its creator only.
- Public List: A list accessible to any DataFox user.
- Company Search: Search and browse for all companies.
- Dynamic List: A search with saved criteria settings for reuse.
- Company Signals: News stories regarding a company.

## Field Descriptions

Here's the glossary of all the fields in Oracle DataFox and their descriptions. Let's use Bigcommerce to demonstrate the examples.

**Note:** All the organization names mentioned here are fictional.

Oracle DataFox updates data in these fields periodically, and the frequency of updates varies from field to field. You can hover over the verified check mark for a field to see when it was verified manually.

| Field | Description | Example |
|---|---|---|
| Top Keywords | Keywords describing the business | business development, ecommerce, SaaS, retail, software, enterprise software, software development and design, engineering software, retail software |
| Year Founded | Year company was founded | 2009 |
| Exit Status | Private, Public, Acquired, Closed down, Subsidiary | Private |
| Location | The primary geographic location<br><br>For a list of country codes, go to *https://www.iso.org/iso-3166-country-codes.html*. Click **Country Codes Collection**, and then click **Full list of country codes**. | Austin, TX |

| Field | Description | Example |
|---|---|---|
| | | |
| Phone Number | The primary phone number for the company | (888) 669-8911 |
| URL | The main web address | www.bigcomputers.com |
| Score | Overall score (composite of other scores) | 1009 |
| Revenue Estimate | Revenue estimate provided by a third party<br>**Note:** The field in the Oracle DataFox app rounds the revenue estimate to the nearest place value. However, the REST API shows the exact figure. | 750000000 |
| Last Funding Round | Series a, b, late stage | Late Stage |
| Last Round Date | Date of the last round of financing | 5/9/2016 |
| Last Round Amount | Amount of the last round of financing | $30,000,000 |
| Months Since Last Funding | Months since the last round of financing | 16 |
| Investors | List of investors | Vision Corporation, Seven Corporation, Large and Associates |
| Headcount | Number of employees provided by a third party<br>**Note:** The field in the Oracle DataFox app rounds the headcount to the nearest place value. However, the REST API shows the exact figure. | 450 |
| Secondary NAICS Codes | Secondary income-producing lines of business | NA |
| Primary NAICS Codes | Primary income-producing lines of business | NA |
| Overview | A lengthy description of a company | BigComputers is a true all-in-one e-commerce platform with the power to grow your business & help you sell more. |
| Stock Ticker | Company stock ticker | NA |
| Postal Code | ZIP code | 78726 |

| Field | Description | Example |
|---|---|---|
| Parent | Company that's an immediate owner of another company, and has subsidiaries | Metasolv is the parent company of Orchestream |
| Domestic Parent | The highest-level parent in a company's corporate ownership chain that's in the same country as the company | Orchestream is the domestic parent of Orchestream |
| Global Parent | The highest-level parent in a company's corporate ownership chain irrespective of the location | Oracle is the global parent of Orchestream |
| DataFox Slug | Unique identifier that's derived from the company name and identifies a company listed in Oracle DataFox. | spruce-street-foods |
| My Private Notes | Personal notes | NA |
| # of Children | Number of subsidiaries | 0 |
| Total Funding | Total amount of funding | 155204369 |
| LinkedIn URL | Company LinkedIn URL | http://www.linkedin.com/company/<LinkedInID> |
| Other Lists | Other lists you can access that contains this company | NA |